

## Required and Permissive Use of Funds

Allowable Costs	Unallowable Costs
<p><b><u>REQUIRED USE OF PERKINS FUNDS [SECTION 135(B)1-9] (Nine Uses of Funds)</u></b>  <b><u>OCTE requires eligible recipients to expend funds in the nine required categories above. If no Perkins Funds are budgeted for a required use, the eligible recipient must explain how local or state funds are used to meet the requirement.</u></b></p> <ol style="list-style-type: none"> <li>1. To strengthen the academic and career and technical skills of students participating in career and technical education programs</li> <li>2. To link career and technical education at the secondary level and career and technical education at the postsecondary level</li> <li>3. To provide students with strong experience in the understanding of all aspects of an industry, which may include work-based learning experiences</li> <li>4. To develop, improve, or expand the use of technology in career and technical education</li> <li>5. To provide professional development programs</li> <li>6. To develop and implement evaluations of the career and technical education programs carried out with funds</li> <li>7. To initiate, improve, expand, and modernize quality career and technical education programs, including relevant technology</li> <li>8. To provide services and activities that are of sufficient size, scope, and quality to be effective</li> <li>9. To provide activities to prepare special populations, including single parents and displaced homemakers who are enrolled in career and technical education programs, for high skill, high wage, or high demand occupations that will lead to self-sufficiency</li> </ol> <p><b><u>PERMISSIVE USE OF FUNDS [Section 135(c)(1-20)] (Funds may be used for these items only after nine required uses above have been met either with Perkins or state/local funds.)</u></b></p> <ol style="list-style-type: none"> <li>1. To involve parents, businesses, and labor organizations, in the design, implementation, and evaluation of career and technical education programs</li> <li>2. To provide career guidance and academic counseling</li> <li>3. For local education and business (including small business) partnerships, including work-related experiences for students, such as internships, entrepreneurship, and job shadowing related to career and technical education programs and industry experience for teachers and faculty</li> <li>4. To provide programs for special populations</li> <li>5. To assist career and technical student organizations</li> <li>6. For mentoring and support services</li> </ol>	<ul style="list-style-type: none"> <li>♦ Capital expenditures</li> <li>♦ Consumable supplies to be made into products to be sold or to be used personally by students, teachers, or other persons (paper ink, CO<sub>2</sub> cartridges, replacement batteries, toner, replacement printer cartridges)</li> <li>♦ Magazines</li> <li>♦ Contingency or "petty cash" funds</li> <li>♦ Contributions and donations</li> <li>♦ Dues/memberships to professional organizations or societies</li> <li>♦ Equipment and supplies for building maintenance</li> <li>♦ Fines and penalties</li> <li>♦ Furniture, files and equipment used by the teacher (Except for new programs)</li> <li>♦ General storage (files, cabinets, etc) not designed to store specific tools or equipment</li> <li>♦ Gifts, door prizes, etc.</li> <li>♦ Instructional aids, uniforms, tools, or other items to be retained by students</li> <li>♦ Interest and other financial costs</li> <li>♦ Leasing of vehicles, car rentals, etc.</li> <li>♦ Lodging, food, transportation, registration fees, dues for Career Technical Student Organizations</li> <li>♦ Maintenance contracts or agreements, equipment repair, and excessive installation costs</li> <li>♦ Meals, banquets, entertainment</li> <li>♦ Promotional materials, such as T-shirts, pens, cups, key chains, etc.</li> <li>♦ Standard classroom furniture not unique to the instructional program (Except for new programs)</li> <li>♦ Tuition costs, university fees, distance learning fees</li> <li>♦ Vehicles such as automobiles, trucks, buses, airplanes, boats, golf carts, snow mobiles, motorcycles</li> <li>♦ Multiple copies of textbooks, except for new programs</li> <li>♦ Sewing machines</li> <li>♦ Replacement of lost, stolen, or damaged items purchased with Perkins funds</li> <li>♦ Curriculum development unless related to career cluster committee work; must have prior approval of CTE program specialist</li> <li>♦ Stipends for training when a teacher receives certification or has travel expenses paid with Perkins funds</li> <li>♦ Payment to teachers for data analysis conducted during school day (contracted time)</li> <li>♦ Paying for data collection/data entry if done during school day (contracted time)</li> <li>♦ Payment for salaries after three years paid with Perkins funds</li> </ul>

**PERMISSIVE USE OF FUNDS [Section 135(c)(1-20)] - continued**

7. For leasing, purchasing, upgrading or adapting equipment
8. For teacher preparation programs that address the integration of academic and career and technical education
9. To develop and expand postsecondary program offerings through the use of distance education
10. To develop initiatives that facilitate the transition of sub-baccalaureate career and technical education students into baccalaureate degree programs including articulation agreements and postsecondary dual and concurrent enrollment programs
11. To provide activities to support entrepreneurship education and training
12. For improving or developing new career and technical education courses, including the development of new proposed career and technical programs of study
13. To develop and support small, personalized career-themed learning communities
14. To provide support for family and consumer sciences programs
15. To provide career and technical education programs for adults and school dropouts to complete the secondary school education, or upgrade the technical skills, of the adults and school dropouts
16. To provide assistance to individuals who have participated in services and activities under this Act in continuing their education or training or finding an appropriate job
17. To support training and activities (such as mentoring and outreach) in non-traditional fields
18. To provide support for training programs in automotive technologies
19. To pool a portion of such funds with a portion of funds available to not less than 1 other eligible recipient for innovative initiatives
20. To support other career and technical education activities that are consistent with the purpose of this Act

## Additional Use of Funds Explanations

**Accountability Policy:** Policy. Perkins funds cannot be used to pay teachers for data analysis done during the school day (contracted time). Requests to use Perkins funds to pay for data collection AND analysis should be combined into a single request in the Perkins budget request. Perkins funds may be used to pay subs during the school day when teachers are involved in data entry and analysis. Data entry alone will not be fundable but must be accompanied by data analysis with a proper justification on the budget request form. Records of the data analysis must be kept and may be requested during OCTE program visits.

**Travel Request Policy:** Out-of-state travel requests shall not exceed \$1,800 and must be approved by OCTE cluster specialist before travel occurs.

**Timeliness of Travel Requests:** Funds for travel are obligated when the travel actually occurs. Example: XYZ Conference occurs in FY 2020; the consortium has 2019 funds left. Can it use the remaining 2019 funds to prepay the conference that occurs in the next fiscal year, 2020? The answer is “No” because the funds will be “obligated” in the 2019 fiscal for travel during the 2020 fiscal year.

**Use of Perkins Funds for Salaries:** Perkins funds may be used to pay for salaries and benefits for new or expanding programs for a maximum of three years. After that, eligible recipients and institutions will need to budget for those salaries using state and/or local funds.

## Definition of Size, Scope, and Quality

To address the size, scope and quality requirements of Perkins IV, OCTE provides the following guidelines: These guidelines are the ideal that programs should work towards. Obviously, not all programs will have all of the quality items, but they should have a goal to work towards the majority of them.

**Size and Scope:** Program Application

1. # of credits offered
2. Which courses are in the programs' sequence of courses

**Quality:** PIP & course syllabi submitted to OCTE

1. Core standards aligned with career clusters core standards
2. Project-based learning included in courses
3. Course syllabi with integrated academic and technical knowledge and skills
4. Work-based experience included (job shadow, internship, etc.)
5. Students' use of technology
6. A variety of assessments used
7. Industry-recognized certificate, license, credential, if available
8. Secondary to postsecondary alignment, including dual credit/enrollment and/or articulation
9. Up-to-date equipment